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ABSTRACT

This document contains three papers from a symposium on action learning that was conducted as part of a conference on human resource development (HRD). "Searching for Meaning in Complex Action Learning Data: What Environments, Acts, and Words Reveal" (Verna J. Willis) analyzes complex action learning documents produced as course requirements in universities in Australia, the United Kingdom, and the United States and discusses the credibility of relationship theories of mind and enactment theories of transformational learning. "Employee Strategies in Organizing Action Learning Programs" (Rob F. Poell, Ferd J. Van der Krogt) presents a theoretical framework for the organization of action learning and uses the framework to analyze four learning-project cases from different work contexts in the Netherlands. "Comparing Action Learning Programs at Six Universities on Three Continents: Similarities and Differences" (Robert L. Dilworth) examines action learning programs at six universities in Australia, England, and the United States and draws the following conclusions: action learning has proven its value and deserves broader application in higher education; action learning can be counter-intuitive to academics; action learning can be counter-cultural to organizations because of its underlying egalitarianism; and action learning is a manifestation of adult learning theories in practice. The papers contain reference sections. (MN)

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Searching for Meaning in Complex Action Learning Data: What Environments, Acts, and Words Reveal

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Analysis of complex action learning documents produced as course requirements in universities on three separate continents strengthens the credibility of relationship theories of mind and enactment theories of transformational learning. Words as data accompanying acts in real work settings, together with verbalized reflections upon these acts, weave a net to catch both organizational and individual meanings.

Keywords: Action Learning, Relational Thinking, Enactment of Learning

A number of qualitative studies have discovered a preponderance of positive outcomes for individuals who engage in action learning (Dilworth & Willis, 1997; Willis, Deans & Jones, 1998; Botham, 1997). With somewhat greater difficulty, researchers also seek to show positive impacts of action learning on organizational processes and outcomes (e.g., ARL™ Inquiry, 1997). Action learning does not lend itself easily to results-oriented evaluation, but there is no longer any question that "change happens." The challenge for the researcher is to devise refinements in the ways change phenomena are described, for a better understanding of what is happening as it happens as well as what the wider implications may be.

Purposes of this study are 1) to capture data that suggest relational thinking presumed to be occurring at intersections between person and environments, and 2) to identify relationships, if any, between verbalized emotional changes and cognitive processing. The approach taken is qualitative, systemic, and psychological in orientation, using in particular a general system theory of Emotional Cognitive Structuring (ECS) that is relatively obscure and that has not entered the mainstream of HRD research. It acts in the service of personality development. While HRD has lately been drawn to a brand of social economic theory that seems largely supportive of performance technology, social psychology and personality theories relevant to adult learners seem to have waned in influence and may be in need of reconsideration to infuse new thought in the field.

An "intersection" of relational importance is a conceptual convenience, defined as the point in written reports from the U.K., Australia, and the U.S. where the action learner appears to cross boundaries either affectively or intellectually toward or away from any of three specific environments that are central in the reporting: the client organization (which may be the student's own work site), the action learning set, and the " intrapersonal space" in which the student struggles to internalize what is being learned. Relational thinking is defined as involving two or more relata ("both-and" matters of interest) and appears boundaryless in the sense that affect, intellect, and environments are not segregated. What we see at intersections may tell us something about how real or artificial it is to imagine that assessment of the impact of action learning on organizations can be made separately from the assessment of its impact on individuals.

Theoretical Framework

Relational thinking in its simplest form, considering two or more relata simultaneously, is axiomatic in general systems theory (GST). It has now become popularly symbolized as "systems thinking." A psychological example of relational thinking is embodied in William Gray's theory of Emotional Cognitive Structuring"(1973, 1975). Gray, a practicing psychiatrist and close friend of GST founder Ludwig von Bertlanffy, insisted that what we call thinking is a system, in which cognitions are always accompanied by emotional correlatives that are further differentiated or "nuanced" over time to lay the basis for restructuring of what we think. The theory may have unexamined relevance to the notion of "emotional intelligence," (Goleman, 1997), which is represented as developmental in nature.

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Another possible application is the recognition of individualism as an emotional-cognitive system nurturant that, rather than operating as a system antagonist, is essential to the forming of action learning communities.

In Gray's view, emotion is the "coder" or organizer of cognitive fragments. The fragments are "that which is organized." A cognition without emotion is not a thought and is easily recognizable by its "dead-endedness," Gray explained, for a cognition has no interest in going beyond itself (1975, I-5). It is his conception of emotion and cognitive elements as required parts of a "double helix" for thought production that is most pertinent to this study. It encourages the search for specific emotional coding that seems to engender thought in the action learning process.

Fundamental assumptions on which this study rests are that human brains work by integrated, relational processes rather than by chained or split-half processes, and that organizational "brains" work much the same way no matter how it may appear to outside observers. The theory that a "collective mind" exists in organizations is entertained at least provisionally by many organizational theorists, and Kirley (1999) has recently taken long steps through painstaking analogical discourse toward supporting the theory.

For the individual brain, learning is therefore assumed to be relational, and transformational to the extent that the learner recognizes emotionally nuanced events that "change everything." Learning for the collective mind of the organization is also assumed to be relational, and transformational to the extent that the whole organization or any critical mass within it "feels different." It is further assumed that the whole-brained organization will itself need to be consciously engaged in emotional cognitive structuring if it is to capitalize on human thought and learning. This structuring is unlikely to be susceptible to knowledge management, if its locus is a psychological or mind process. A final important assumption is that the words people use to describe their experiences in action learning *in the context of actions taken* can serve to illuminate both organizational and individual meanings either derived from the process or left unchanged by it. Enactment of learning that fully engages thought (not learning by doing) should provide optimal opportunity for transformation of individual and organization.

Problem Statement and Direction of Inquiry

Organizations can be said to "think" if the cognition is coded by emotion and is relational. If an organization thinks, it must be solely because individuals within it think, and do so in mutual, relational ways. Action learning is meant to change individual and organizational thought about self, others, and environments, as action and reflection proceed simultaneously.

Graduate students in several universities discover what action learning is by enacting their learning as part or all of their academic credentialing. At the Revans Centre in the U.K., graduate theses and dissertations literally determine success or failure in the achievement of a "degree by action learning." They entail three kinds of investigation and reporting, framed by these questions: 1) What did I achieve? 2) What did I learn? and 3) How might I apply my experiences in the future? In essence, student reports are inquiries into their own inquiry processes, which have included action research initiatives in their own or a client organization, collaborative inquiry in action learning sets, and independent reading, workshops and tutorials. In every case, the organizational environment is uppermost in student's minds, and the "what did I "and "how might I" questions are answered with difficulty because they require a much deeper level of relational thinking and analysis.

The University of Ballarat in Australia uses a different combination of structures and processes, seeking similar outcomes. After preparatory workshops, candidates for the Master of Business Management degree (MBM) must negotiate an operational contract with a client, then construct an associated learning contract with a project supervisor and an action learning set at the university. The degree is not earned until the work with the client, the work with the set, and the inner work of learning have been reported upon.

In the U.S., reports already sorted into a data base shared by Georgia State University and Virginia Commonwealth University contain similar process and personal learning information, as well as comments on the organization's acceptance of the findings from the action learning. These are not reports of thesis length, but have many of the same features, including reflections on personal learning and on the action learning process. The three sets of source materials have all been collected in English-speaking nations, and therefore are expected to capture only evidence of relational thinking as it has occurred in these language-linked nations. Anonymity of entries in the U.S. data base is contractually preserved, and though the theses from other countries are open records, the author's names and thesis page numbers have not been used in this article because of sensitivity to the personal nature of the material.

Research Protocol

The research examined texts that include six completed theses from the Revans Centre, one comprehensive report from the University of Ballarat, and sorted text data from the shared data base in the U.S. As is customary in qualitative research, definitive hypotheses were avoided to allow for emergent design as data was progressively examined and sorted. These were the major questions of interest, all keyed either to relational thinking and/or to emotional cognitive structuring. They are meant to help illuminate the research dialogue over personal vs. organizational impact of action learning *and* the reasonableness of making greater use of action learning as part of the HRD organizational change arsenal. "Environments" refers to the client organization, the action learning set, and the "intrapersonal space" of the learner.

1) Does data available suggest that action learners typically have two or more environments (as defined above) in mind during the action learning process or do learners maintain a singular focus?
2) What is the nature of the evidence in the data that relational thinking is or is not occurring? Are there clues to environmental boundarylessness present in the words, the acts, or both? Are environments depicted as alien from one another? Does there seem to be a lack of sharp demarcation between personal learning and organizational learning? Do learners believe that both are occurring simultaneously?
3) Do action learners report their learning as primarily affective, primarily cognitive, or as a mix that can be understood by researchers as emotional cognitive structuring? Does emotion seem to "code" cognition so that thinking/learning about self, others, and environments can be seen to have at least as high a priority as problem-solving ?
4) Does thinking appear to become more systemic? Do learners tend to see organizations as more systemic than they initially realized?

Because a major block of data has already been sorted by means of NUD-IST software coding and card sort were thought sufficient for examining the remaining documents.

Findings, Interpretations, and Conclusions: Five Cases

Reporting of learning and change at the personal level, because of its potency, typically obscures the reporting of what the organization may have learned from person(s) in an action learning set. However , re-examining students' comments about their personal learning, particularly when juxtaposed with those passages where they are discussing either organization or action learning set activity, also shows that organizational learning is occurring.

Case One: Australian Report/Thesis

One example from a pair of text segments is drawn from the only Australian document examined. The first segment seems person-centered, but when analyzed with another entry, the segments together show organizational impact. The student undertook a Volunteer Enhancement Project to develop a strategic plan for attracting volunteers to staff the Ballarat Begonia Festival, to create a social program to keep them interested throughout the year, and to design a program of recognition and future career support. Reporting her actions , she says she was conscious of "rocking the boat" and taking personal risk as she moved forward with what the organization at first suspected was simply a project that met *her* needs. Initially they did not see "what was in it for them," and so she altered her strategies:

> I devised new solutions (changing the survey to focus groups, reporting directly to the Committee, sharing my thoughts and actions with the volunteer sub-committee, accepting the culture of the Festival management…)

Here, personal learning is apparent. She learns to "accept" rather than confront an organizational culture. She challenges her own thinking and revises actions. Later, she knows that what resulted from her project "has become a part of the fabric of the Ballarat Begonia Festival, a major tourist drawcard and contributor to the thriving community of the Ballarat region." Clearly the whole organization learned, and will do things differently in the future. Because she learned personally and reframed her own organizational effort, the involvement of

volunteers in planning for a yearly tourist event that has a major economic impact on Ballarat and the region was institutionalized.

What is also striking in this case is a series of Johari windows depicting the evolution of openness and collaboration of the action learner with her client organization, her professor, and her university action learning set. The client organization series is of most interest here. At first, the window panes representing the open arena and the façade were very small. Although she "knew" the festival committee from her earlier work as a volunteer, she had had no opportunity to provide personal or working information about her project to the committee as a whole. In the very large pane called blind spot, she admits she did not "pick up on" reasons why her project was thought questionable and her methods unacceptable. The largest pane of all -- unknown-- is worth quoting also because it is redolent with emotion. In March she says:

> I did not know they would object to my proposed methodologies for gathering information from the volunteers. I didn't know that people I thought had been my friends and allies would question my motivations for the project. I didn't know how I would react to that.

By November, the unknown pane had shrunk to a simple and accepted fact: "The political nature of the committee leaves some unknowns remaining." In the interim, the emotional shocks she had encountered led to understanding that her real client was not an individual leader, but a committee of 10, a realization which then led to meeting with the whole committee to reach compromise.

At least tentatively, this appears to be a case of emotional cognitive structuring, over time, enabling personality development. But the finding least open to challenge in this case is that personal impact of learning shaded over into organizational learning and change.

Case Two: U.K. Thesis One

A professional trainer in the U.K. was providing management development opportunities for doctors in a National Health Services Trust. Engaged also in a master's program in action learning at the Revans Centre for Action Learning and Research, University of Salford, she soon found herself "questioning not only the efficacy of my efforts but the core of my approach to my work."

> Though I had kept abreast of changes in my profession and had progressed from "chalk and talk" as an Army instructor to more participative approaches, to "learning contracts," and had recently written a training and development strategy document in which we aspired to become a "learning organization," I had professionally, changed very little from my early years. Although… I "heard the words, I read the books, I debated the issues and at times thought I was genuinely involved," it was at this point that I understood that Action Learning offered opportunities for personal development that I could not only profit from personally but which I had a duty to exploit professionally. I turned to Revan's work to develop a personal understanding of Action Learning.

Ironically, just as she saw how action learning could help the managers she was working with and as she herself was "waking up to the power of learning in this way," this trainer saw that her professional world was turning "in a different direction entirely" toward competency-based training design. With her new insights, she concluded that

> These [approaches] seem to focus on external representations of ability without acknowledging the linkages between these and inner motivators… I have arrived at my reservations about competence approaches by way of two fundamental issues, context and ethics….Why has Action Learning been much more efficacious in my personal development than other developmental activities in which I have engaged?… The primary difference between this and other forms of learning lies in making explicit the attention which needs to be given to personal growth [as] a focus and not simply a by-product of learning.

She noted that the process had involved "upheaval of my innermost thoughts and feelings and recognizing linkages between these and the way in which I manage the tasks I perform."

Using this example may seem to be a deliberate ideological barrage to help make a case for action learning, implying that if one seasoned trainer "sees the light," then so should we all. But that is not the purpose of quoting this scholar-practitioner at length. Her story stands on its own as a clear description of transformational learning, which is for Mezirow "centrally concerned with the structure and process of construal, validity testing, and reorganization of meaning… " (1991, p. 7). Furthermore, it is obvious throughout the text that she has several environments in mind simultaneously, linking relata from each environment with relata from others. It is relational thinking she displays. Her profession begins to seem less systemic than she thought it was, and she discovers it to

be a profession far less comfortable with emotion than she now believes it needs to be. She uses the term "feelings" instead of the word emotion, but what she writes is emotionally charged, produces new insights, and serves throughout her discourse as an exemplum of progressive emotional cognitive structuring. Differentiations of feeling (nuances) attach to newly appropriate (coded) bundles of cognitive fragments, as Gray would view the process. The connection between impact on her and impact on the organization through action learning is unclear. Although in the midst of her degree program she was downsized from her job, it appears circumstantially to be unrelated to action learning or what use she might have made of it in the health care setting. At first angry about the "redundancy," she began to think excitedly about doing independent consulting.

Case Three: U.K. Thesis Two

A speech and language therapist sought to help her organization expand and institutionalize the use of flex-time in providing health care. Other professionals in the group were chiropodists and physical therapists. She was aware that, although the personnel manager had given lip service to support her research mission, he neither aided her efforts nor took actions himself on the data she gathered. She had what she thought was a workable strategy: to further codify flex-time rules in her own department where there was a favorable climate, and then to inventory other groups so see whether there was support for flex-time in other areas of the organization. She felt that if she could help change the "internal mappings" so that other professionals perceived the advantages of new employment rules, then she would have succeeded in changing the organization's theory-in-use. If that occurred, she would be able to say that the organization "learned."

She wondered how direct the links are between learning and change, and during the project came to the conclusion that "Real and permanent changes in behavior must and can only come about when personal constructs are altered by the learning process." She could testify to the truth of this from her own experience in earning a degree by action learning. Nevertheless, she went through a lengthy process of trying to find other ways to test the reliability of her premise. She could ask subordinates, a spouse, other set members, or even an outside observer to determine whether she personally had learned and changed. But this still left possibilities for distortion. So in the end she decided that she had to trust herself. It was "reasonable to assume that learning would give rise to change, that the changes were attributable to action learning, and that someone would be able to observe these changes."

> Reflection on the new information generated by my actions... enabled me to repeatedly reassess and adjust my internally held models of the organization, my colleagues, and people and change in general... I believe I learned to increase my effectiveness in a changing world by recognizing the need for continual development (restructuring of myself)... resulting in altered constructs changes in behavior are the end product.

She felt that the action learning set helped by "pushing me over the boundary between my current thinking and the acquisition of new ideas."

> The refusal of action learning to be neatly separated into a management development module, its propensity for overflowing out of a given project and into every aspect of work and personal life, demonstrated to me a major difference between learning and training.

Like learning to drive, she added, you have to *do* action learning, and you alter surroundings by "passing through" them. In her flow diagram of the process, this passing through is shown as learning made explicit through reflection.

She does not overestimate the impact of her work on the organization, given the fact that the physical therapists and the personnel director shared the perception that strict nine to five hours were more professional and were unrelated to the professional recruitment problem the organization was experiencing.

But she did establish new procedures in her own department and also found strong support for similar changes among the chiropodists. While personal impacts of action learning did not map over the whole territory of the organization, they seem to have bled out over large segments of it, and certainly into the lives of those with whom she worked most closely.

In this example there are explicit references to relational, boundaryless thinking and to emotional cognit ive structuring in the way her thinking evolved. She does not say that emotions led directly to insights that fuel new thinking, but the "restructuring of self" idea carries that implication.

Case Four: U.K. Thesis Three

In this example, limited text is sufficiently revealing. A director of mental health service development for a National Health Trust region discovered that "managing without shoes" is a confusing but heady experience. He was challenged to develop new forms and venues for mental health service delivery in partnership with users of such services. For him, becoming less of a bureaucrat and more of an entrepreneur was a professional sea change:

> I thought I involved people who use our services when I was a service manager, but the experience of developing this project [the creation of an innovative, multi-purpose Creative Learning Center] confirmed to me that this is not the case. They would often be consulted after a decision had been made.

As he devised new ways to work with these consumers, his respect for them grew. He called it learning the art of managing without shoes not only because he was asked to remove his shoes at his first meeting with them, but also because he came to see this as a metaphor "that reflects how uncomfortable and vulnerable I have felt as I encountered a range of new experiences." He will continue to build other partnerships as the project progresses toward implementation.

The person-centered approach to patient care makes deliberate use of a social model, rather than a medical one. This represents an organizational sea change for a national health care entity that is still in the throes of decentralization and reorientation toward the communities served. The executive director of the Trust who chose the new development officer sees the transformation of his subordinate this way:

> S. is now clearly the same person with the same values and drive and with an intense commitment. However, he has learned to risk himself in a context which has few of the familiar handholds and which is rich in its novelty and uncertainty. He has done this is a way which has become increasingly self-confident and self-aware. He has become more reflective, but in doing so, has learned to use his reflection to digest and integrate his experiences and move forward. It is a creative and enabling process. The effect of this is that his enthusiasm and drive is now addressed not just to achieving objectives, but also to engaging others and to grappling with concepts and ideas....I have always valued S. and his contribution, but I have been fascinated by the way his vision and style have opened and skills developed.

In an interview I conducted with S. after his submission of thesis, he bluntly acknowledged that he had been forced by his job circumstances to change, that the action learning had helped him accomplish this, and that being a changed man is transformative in more ways that he had ever thought possible. He spends a lot of time just "hearing what people say." To conclude that he has no effect on the organization that sponsored his action learning or on the community in which he now spends much of his time would be disingenuous. That he has had to engage in relational thinking and has used his own uncomfortable emotions to restructure his thinking is also a justifiable conclusion.

Case Five: U.S. Reflection Paper

The fifth and last example is from a reflection paper written by a student in the U.S. after an intensive summer experience with action learning in the U.K. The student was one of 30 from different countries who were sorted by diversity into five action learning sets of six people each, and assigned to work with managers from two hospitals in the Manchester area that were facing the difficulties of a merger. Data from this event make up a large part of the shared U.S. data base on action learning and some of the findings have been reported earlier (Dilworth & Willis, 1997; Willis & Dilworth, 1998). Each set worked with their assigned manager as a team, having periodic consultations with the manager during the two- week intervention.

This was a different structure for action learning than was provided in any of the previous examples, where each thesis writer worked independently with the client group and then touched bases with a university-based action learning set to share concerns and gain new insights about their work. The U.S. author describes the process her set used to learn about the client manager's problem in this way:

> We delved into many different perspectives concentrating on the internal and external customers, politics, budgets, cultures (formal and informal), traditions, communication strategies, technology, reward structures, and the mission and value statements of the hospitals... We found that "reading between the lines" was a necessity, even though hospital representatives were honest and straightforward. We... [ooked] for implications and values that may not have been evident to those involved... .
>
> The problem focus as it was presented to us was laden with systemic disconnects. We decided to break it down to foundational, relational segments, and asked questions relating to these disconnects... It was stressful because we each saw andheard different things even though we

were all at the same meetings... Our "filters" were on and colored our line of reasoning, which was good because we had multiple perspectives. The stress was the result of debating and challenging issues that had meaning for us.

The narrator then speaks of "overreacting" to an offhand comment by one of the set members that appeared to be disrespectful of other members of the group and their efforts. Because she was "not confrontational" by nature, it was "difficult" for her to say "what I thought on the spot," but she did so and this was clearly a defining moment for her, discussed at length in her paper. Subsequent comments included these which are especially relevant to this study:

> It was interesting to participate and observe the things that changed and the things that seemed to remain constant... I thought about what I brought to the set ... My worry was that I didn't see my own strengths and weaknesses clearly... There wasn't a lot of time to take a challenge and reframe one's perspective, or "unfreeze." It takes a person a long time to develop perspectives... I think there were quite a few of us that pushed our boundaries. Collectively we pushed through some difficult times. I think we gave a quality analysis and provided fresh questions.

This example of a reflection paper that did not attempt either length or the detailed follow-up of the two-week intervention does not and cannot be expected to reflect the same richness and contextual detail that a two-year engagement with action learning and thesis writing must. However, there are clear indications from the set member quoted that the set engaged in relational thinking, adjusted and nuanced emotions that subsequently organized or coded cognitive fragments floating in the set, as voiced by multiple perspectives. The primary "environments" in this case appear to be other "intrapersonal spaces," at least for this participant. The environment of the client organization ran second. In essence, the set delivered a product --a quality analysis and some fresh questions. There is no indication from this writer that the organization learned or was transformed in any way (though other reports in the data base do give such indications). Finding items in written materials that can be assessed in terms of organizational change in thinking and learning seems to be partly conditioned by duration of contact with action learning that the writers have --not neccesarily in clock hours but through a passage of time. But finding such items may also be conditioned by the significance episodes have for a particular learner at the point of writing about experiences. Perhaps when emotions are in what Gray calls "global" or "primary color" mode, and not yet differentiated, the cognitive fragments they code are more intrapersonal than organizational.

Recommendations for HRD

Though the examples are limited, they may taken together provide incentive for further investigation along the lines laid out in this research. It is almost impossible to read such narratives separated in time, by culture, and by distance, yet finding the same elements over and over, and not become convinced that action learning is a strategic force for human resource development. There is also evidence that the writers quoted here, in all likelihood unknown to each other and never having worked together, experience much the same sort of restructuring of what they think and what they subsequently act upon once they engage in action learning. Relational, systemic thinking and emotional coding appear to be demanded by action learning, and it may be that these imperatives override many cultural differences. It may even be the case that non-western cultures more easily use these non-linear kinds of processes than westerners do. Research possibilities seem endless, and this is admittedly a very small beginning.

In regard to the four questions of interest, there does appear to be support for believing that action learners rarely if ever maintain a unitary focus. They are not "hung up" on any of the three environments exclusively. Relational thinking is, if not engendered by the process at least compatible with it. Students begin to look for systemic connections both in the client organization and the set, and generally in themselves as well. The "alien" appearance of environments (self, others, client organizations) tends to fade as interactions occur and expand. Learners are aware of this, although they still tend to mark off areas of personal learning from areas of organizational learning. One possibility that occurs to me as a result of this study is that students should be guided themselves to seek out juxtapositions of self/organization change, adding a specific section on organizational learning to their theses and project reports. It may be that students tend to discount the learning of the organization because what they have learned themselves is so remarkable.

Feeling statements are made; students are aware of their own and others' emotions in the course of the work. They reflect and organize and refine their view of what occurs and the role they play in it. At least metaphorically, emotional cognitive structuring seems to be happening and for some it is transformational.

There are specific initiatives that this study indicates HRD should be taking, enumerated as needs or directions below:

- ***HRD needs to find ways to factor emotion into organizational and individual learning.***

The role of emotion in human resource development is insufficiently addressed in the research and practice literature in the field. Except for certain types of OD interventions, the relationship between emotion and cognition does not seem to be a comfortable arena for discussion. It is like working with one half of a double helix. In Johari window terms, it may be a crucial "blind spot" in HRD reckoning to leave the emotion in learning to chance or to suppress it in favor of observable performance. If organizations continue to seal off the emotional development of persons from the work environment, giving "feeling" a nod in terms of the rituals and celebrations of culture but not in terms of personality development and growing psychological efficacy, then new cognitive structure may not appear as rapidly as needed.

Gray asked that we aim for "new neuronal networks" [dendrite branching and relational brain activity], which he believed new emotional cognitive structuring (ECS) to be. A person cannot learn without producing change in neuronal networks. The goal for Gray is the self-organization of personality, progressing from simple to higher order affects, which in turn (as one thesis writer said) changes thinking and has enormous influence on how tasks are performed.

- ***HRD needs to take action learning more seriously and honor it distinctiveness.***
  Action learners with very little practice seem remarkably adept at finding and sorting their emotional nuances into appropriate "bins" or schemas. First, however, they need to be made aware that this can and should happen if they are interested in personal development and confidence/ capacity building. They may even need to consider the possibility that what they think is organized by their emotional coding, and that it is handicapping to believe otherwise. Conceding that emotion has a role and giving it legitimacy through action learning is a quick start, if not a quick fix. Relational thinking and emotional integrating, while a long term proposition for individual and organization alike, cannot even begin unless there is a way to make an initial investment.
- ***Even as HRD practitioners come to realize that culture makes a difference in how we proceed, there is a growing need to understand that emotion and thought are common to all cultures.***
  It may be that emotion codes differently for different people, but that it really does code how we act and think may be an insight we are in danger of losing in our struggle to find "mechanisms" to use cross-culturally.
- ***Systems thinking, now become almost a mantra of organizational learning theorists, needs to be recognized by HRD as a deeply personal and relational matter.***
  It is multi-directional, permutational, and not a "flow-chart of the mind." Thinking happens in persons as well as organizations and does not proceed either in straight lines or inside lines. It does not emerge by cookie-cutter but idiosyncratically.
- ***Finally, HRD may do well to take a deeper interest in the nature of and conflicts in its own philosophies and its own paths to perspective transformation.***
  We can hardly encourage others to differentiate and change and learn if we cannot do the same for ourselves.

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Employee Strategies in Organizing Action Learning Programs

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Existing action learning approaches pay relatively little attention to the strategies of employees (compared to those of learning coaches) and tend to ignore the impact of different work contexts on learning. This study addresses the various ways in which employees organize their own action learning programs in different work contexts. A theoretical framework for the organization of action learning projects is presented, which introduces core activities to be undertaken in an orientation, learning, and continuation phase. Four learning-project cases from different work contexts are analyzed using this framework. It is concluded that employees have their own strategies to organize action learning programs. Moreover, there are several ways in which they organize these learning projects. The work context is found to be an important factor to explain differences among learning programs.

Keywords: Action Learning, Employee Directed Learning, Organizational Learning

Action learning is widely regarded as an effective HRD intervention (Inglis, 1994; McGill & Beaty, 1992). Yorks, O'Neil & Marsick (1999, p. 3) define action learning as "an approach to working with and developing people that uses work on an actual project or problem as the way to learn. Participants work in small groups to take action to solve their problem and learn how to learn from that action. Often a learning coach works with the group in order to help the members learn how to balance their work with the learning from that work."

This definition emphasizes learning by solving real-life work problems in groups. Although an action learning approach seems suited for all kinds of employees, it is often associated with management learning and development (Mumford, 1997; Revans, 1980; Watkins & Brooks, 1994). This raises the question whether employees cannot also learn by solving real-life work problems in groups. Moreover, the definition stresses the role of a learning coach in helping group members learn from their work. This raises the question whether employees cannot also organize group learning by themselves, without the help of a coach.

O'Neil & Dilworth (1999, p. 20) list a number of considerations that have to be addressed in designing action learning programs:

- Work on a familiar or unfamiliar problem?
- Learn in a familiar or unfamiliar setting?
- Define an individual or a group project?
- How to choose participants?
- How much time investment is feasible?
- Should learning content be provided, and if so, what and how?

These basic design issues are important ones to cover, because the answer to the questions will impact the specific type of action learning program that is organized. The HRD profession knows a lot about the strategies that course designers should employ in order to make training programs effective. However, when it comes to more informal ways of learning on the job, effective strategies of employees (and their managers) require much more emphasis. Unfortunately, HRD knowledge in this domain is still quite limited.

Theoretical Framework

Poell & Van der Krogt (in press) present an approach to organizing work-related learning programs, which puts employee strategies at the focus of attention. All employees are considered to be every-day learners, though to a large extent unconsciously, in that they find ways to deal with the problems they face in doing and improving their work. For example, they seek support from colleagues or team leaders, they experiment, they call upon experts, or they engage in trial-and-error problem solving.

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Employees can consciously make their learning and work improvement efforts more explicit and systematic by defining it in terms of a learning project, individually or group based. Poell (1998) demonstrated that employees may or may not need support from a learning coach in organizing their learning project. One reason why they would choose not to call upon advisers or managers for assistance is that their strategies to organize learning projects may differ significantly, as Poell, Van der Krogt and Wildemeersch (1999) have shown.
One reason why they would choose such support is that different strategies are not necessarily detrimental to employee learning and work improvement. It is important for employees and other learning project members, however, to be aware of differences in learning views, work views, and the various strategies associated with those views. Most importantly, though, employees use strategies of their own in organizing learning programs (Poell, 1998).

On the basis of these viewpoints, Poell & Van der Krogt (in press) present a method of organizing action learning programs that seek to combine elements of every-day learning, individual self-directed learning, group learning, and facilitator-directed learning activities. The method comprises three main phases: orientation, learning, and continuation. The orientation phase enables employees to make the transition from every-day learning to the action learning program, whilst the continuation phase serves to incorporate lessons learned during the core phase in their every-day learning efforts within the organization.

Orientation Phase. This first phase brings employees from an initial idea of learning something new to a group learning contract. There are four essential activities during the first phase: mobilizing the participants, analyzing the learning theme, putting the learning program into context, and making a learning contract.

Mobilizing the Participants. Individual members and the participants as a group reflect on their learning needs and how their participation in a learning project could contribute to fulfilling these needs. Group members make arrangements regarding their own tasks and support needed from others.

Analyzing the Learning Theme. Participants analyze their work problems and the developments in the organization that have led to these problems. The analysis results in a broad program of learning activities to be undertaken and the learning objectives to be met.

Putting the Learning Program into Context. As the learning program will not take place in a vacuum, the opportunities offered by the existing learning system have to be taken into account. Which elements in the current learning facilities can be used, and what additions to it need to be made during the project? Gaining commitment and facilities from significant actors around the learning project is a crucial activity here.

Making a Learning Contract. The outcome of all these activities is a (psychological) learning contract, which contains an agreement about the commitment of those concerned, the content and organization of the learning project, and its relationship to the existing learning system. The contract is an explicit expression of the ideas and possibilities of the employees, managers, and coaches involved in the learning program.

Learning Phase. This second, and core, phase ranges from the finalization of the learning contract to the attainment of learning outcomes. This is where the actual learning program is created and performed, supported by processes of coordination and guidance. At the same time the learning program is optimized, constantly tuned to changing viewpoints regarding learning and work in those involved, and continually geared to the relevant developments in the work.

Creating the Learning Program. The agreements and ideas from the orientation phase are now put into practice. Three core activities are performed at this stage. *1) Learning in Learning Situations.* Participants engage in learning activities together, reflect upon their progress, and thus develop their expertise and action repertoire. Some examples of possible learning activities include work experiments, giving each other feedback, playing a simulation game, discussing new ideas, participating in on-the-job training. *2) Learning-Program Coordination.* The learning project comprises various different activities, which have to be coordinated in order to make up a coherent program. Participants extract lessons from previous activities and translate them into the next activity to be undertaken within the program as a whole. *3) Learning-Program Guidance.* Individual set members and the group as a whole usually need guidance to help them create a meaningful learning program. This activity encompasses making participants aware of available options within the learning project, painting scenarios for these various alternatives, and helping members to make the best choice from possible activities.

Optimizing the Learning Program. The ongoing optimization process is closely related to program creation and runs concurrently with it. It addresses three central issues. *1) Tuning to Learning Views.* Throughout the project, participants ask themselves whether the learning program is still consistent with their views on what they should learn and how it should been learned. Discrepancies are discussed and, if possible, resolved by adapting the learning activities to these views. *2) Tuning to Work Views.* Similarly, set members reflect on the question to what

extent the learning program is still tuned to their views of an optimal work organization and content. If needed, other types of learning activities are added. *3) Relevance for Work.* Participants make sure that their learning activities contribute to solving their work problems. Should this not be the case, then work developments are reanalyzed. If unforeseen work problems arise during the project, learning activities are redirected in order to tackle them as part of the program.

Continuation Phase. This third and final phase takes employees from the initial learning outcomes to a lasting effect. On the basis of the lessons learned during the program, employees are enabled to resume their individual every-day learning paths. These lessons are also translated to the organizational level in order to improve the corporate learning system.

Resuming Individual Learning Paths. Set members are encouraged to build upon their initial learning outcomes. They alter their personal development plan in order to incorporate and expand the lessons learned during the learning project, both in terms of what they have learned and how they have learned it. Subsequent every-day learning and work improvement activities of the participants are impacted by these reflections.

Improving the Organizational Learning System. The organization can also learn from the experiences gained during the learning project. This can be achieved by participants communicating and collaborating with other people in the corporate learning system, for example, by having them as a member or coach in a new learning set. Another possibility is to systematize the learning materials that came out of the project. Finally, the implicit knowledge that members have gained about organizing and optimizing the learning program can be made explicit through interviews, surveys, a project journal, or minutes of set meetings.

Problem Statement and Research Questions

There is some empirical research to indicate that action learning programs can be organized in various different ways. Poell, Van der Krogt and Wildemeersch (1999) used four theoretical types of learning projects in order to study the differences among sixteen learning-project cases. Three clusters of learning projects emerged, which were labeled as: 'Extended Training', 'Directed Reflection', and 'Reflective Innovation'. Apparently, employees have several options in organizing their own learning programs.

Furthermore, the work context seems to be an important condition under which learning is organized (Torraco, 1999). Van der Krogt (1998) investigated the relationship between corporate learning systems and the organization of work. He found that certain types of corporate learning systems are more likely to be found in corresponding work systems. A contractual or 'liberal' learning system is related to individual work, whereas a regulated or 'vertical' learning system is more likely to occur in task work. An egalitarian or 'horizontal' learning system is connected to group work, whilst an innovative or 'external' learning system is characteristic of professional work (cf. Table 1; Mintzberg, 1979). Poell, Van der Krogt and Wildemeersch (1999) also concluded that certain types of learning projects are more likely to be found in certain work types. In short, the work context appears to be a crucial factor in explaining which type of learning project employees will organize. We will use the expected relationships between work and learning to interpret and typify the action learning programs described in this study.

Table 1.
The relationship between work and learning systems.

	Type Of Learning System			
Work Type	Contractual, 'Liberal'	Regulated, 'Vertical'	Egalitarian, 'Horizontal'	Innovative, 'External'
Individual Work	X			
Task Work		X		
Group Work			X	
Professional Work				X

The present study intends to demonstrate the various ways in which employees organize action learning programs related to their work context. Working on the basis of the action learning method described above, it aims to

develop a number of different ways in which employees, managers and learning coaches can systematize the every-day learning and work improvement efforts of employees.
The following **research questions** will be investigated:

1. Which activities are undertaken in the orientation, learning and continuation phases of action learning programs? And which ones of those activities are conducted by employees?
2. Are there any differences in the way action learning programs are organized? And, if yes, are these related to the work context (as presented in Table 1)?

Methodology

A secondary analysis of existing learning-project material was performed, including interview summaries and learning-project documents (Poell, 1998). Four cases of work-related learning projects conducted by employees were selected on the basis of different work types in which they were carried out. Four different work types - task, individual, professional and group work - were included in order to maximize the possible variation in learning programs (in view of our second research question). Poell (1998) gives a more elaborate account of the methodology used to study these cases.

Interview summaries corrected by interviewees were used to describe the activities of employees, managers and learning coaches in the various sub-categories of the orientation, learning, and continuation phases of each learning project. An effort was made to increase inter-rater reliability by having two researchers discuss the learning-project descriptions for consistency. Cases were re-analyzed with a focus on employee strategies in preparing, performing and concluding their learning project (in view of our first research question).

Results

Case A. This learning project takes place in an organization referred to as 'Factory', which is characterized by task work. The learning program is conducted by process operators who aim at making the work processes more transparent.

Orientation Phase. Management takes the initiative to start an improvement team, because material wastage is perceived to be excessive. Earlier attempts by management to deal with this problem in a top-down fashion were not successful. A team leader is appointed, who invites a facilitator and seven operators from all five shifts to join on a voluntary basis. The team adopts the problem statement and objectives of their management and decides to focus on clarifying the organization of work processes in the factory. Team members arrange to meet for two hours every week and to work in small groups in between. Commitment from other shift workers is sought by regular two-way communication about improvement activities and other ideas.

Learning Phase. A specific problem-solving method geared to operator use is taken as a guideline to coordinate team learning activities. The facilitator guides the operators through applying this method to their specific problem. Assignments are issued, carried out in subgroups, and evaluated in plenary team sessions. Learning activities include holding a survey among fellow operators, paying a working visit to a similar factory, inviting process experts for a lecture, experimenting with incremental changes to the work process, instructing their own shift members, improvising, and introducing broader changes to shifts. Few optimization efforts are made during the learning project. The problem-solving method is applied in a linear fashion, but it provides ample opportunities for the operators to tune the activities to their own views on work and learning.

Continuation Phase. The operators have gained a lot of experience with a structured problem-solving method, which they can apply in their daily work and in further learning projects. Management has learned that an improvement team brings about more changes and benefits than any of the top-down approaches they have tried before. In that sense, the organizational learning system has been enriched.

Type of Learning Program. This case can be labeled as a well-performed, systematic vertical learning project. The strategy of direct representation of employees in organizing work improvement activities allowed the participants to optimize a regulated learning system.

Case B. This learning project is organized in a night school labeled 'College', which represents individual work. A group of liberal arts teachers carries out a learning program around the theme of "Guiding students who learn independently".

Orientation Phase. School management takes the initiative to have an external advisor hold a learning needs survey among the teachers. Several learning themes emerge from this exercise, one of which is student independent

learning. Teachers are asked to join a learning group around this theme on a voluntary basis. A small group starts by discussing the specific outcomes of the survey and translating them into ideas for the learning program. One of the teachers starts having regular meetings with the external advisor in order to inspire the learning set and evaluate its progress. They also use survey results about the college learning facilities and teacher views on their own learning and work situation. School management is very interested in the outcomes of this learning group but leaves it up to the teachers themselves to organize it.

Learning Phase. Coordination of the learning activities rests with the five group members and is largely interest driven. During the project, the external advisor suggests possible learning activities to the group via one member. The teachers start by discussing their own classroom practices on the basis of one of the classes recorded on videotape. In a second meeting, one of the teachers presents his experiences in using the open learning center at a different college. They read and discuss journal articles together. Some group members attend each other's classes and give feedback to one another. They support each other doing individual classroom experiments with students' independent learning. Some of the insights gained in the project are used in a newly introduced teaching method. One group session, which turns out to be the final one, is spent listing the consequences of independent student learning to exam regulations. Although the teachers have every freedom to carry on organizing the project, they cannot find a way to make the group activities more concrete and meaningful to their work situation. Hence, the project runs down.

Continuation Phase. Although the project peters out in the end, individual members have experienced new ways of learning together with their colleagues. School management has learned that teachers are willing to organize their own learning projects. Some lessons from the group project have been used for organizational changes. On the other hand, there is also a sense that the project could have produced more concrete output if better arrangements had been made.

Type of Learning Program. This case represents a rather unsystematic liberal learning project, characterized by a lack of coherence in its arrangements among the participants, and a lack of reflection on learning activities as the program is carried out. The group of individual teachers is too loosely organized and does not actively seek opportunities to bring more focus to their joint activities.

Case C. *Case C* occurs in an organization called 'Hospital', where professional work is found. Medical doctors organize a learning project with the specific aim of developing a new medical treatment.

Orientation Phase. A group of medical doctors take the initiative to prepare for the introduction of a new treatment. They invite a nurse and a number of technicians to join the project group. Every individual member's expertise is needed to make the new treatment a success. The participants study the scarce body of literature about the treatment. They also pay a working visit to a specialized clinic abroad and bring home the material needed to perform the treatment. The hospital management lends financial support to the project group and does not interfere otherwise. The project is considered useful to raise the hospital's national profile.

Learning Phase. Initially, experimental treatments are performed on sheep. The problems that arise are solved partly by self-study, partly by group evaluation sessions. The treatment is optimized a number of times before it is finally performed on patients. The first results of the new working method are discussed with fellow medics at a special conference and in scientific journals. More experiments gradually lead to standardization of the treatment protocol. Doctors who were not part of the initial project group now learn the new treatment from performing it 'at the bed' with a more experienced colleague. The whole learning program is organized on the basis of continuous adaptation to newly developed insights along the way. However, the participants methodically work their way towards establishing a standardized treatment protocol and use the professional expertise of their fellow medics to this end. After all, they have chosen to work on the cutting edge of medical expertise in their discipline.

Continuation Phase. The participants resume their every-day learning efforts having experienced the benefits of multidisciplinary collaboration during the learning project. Thus, this professional organization has integrated elements of multidisciplinary group learning into its profession-based innovative learning system.

Type of Learning Program. This case can be referred to as a systematic and well-performed external learning project. Besides a strategy of professional innovation, the way in which the doctors develop a new working method displays horizontal characteristics as well, in that they learn constantly from their learning-project experiences and keep adapting the course of the learning program accordingly.

Case D. This learning program takes place in an organizational ' Consultancy', characterized by group work. A number of consultants undertake a learning project aimed at applying the concept of the learning organization commercially.

Orientation Phase. The program starts when one of the consultants, after a presentation on 'The Learning Organization', is asked by her colleagues to "do something more around this topic". This is a largely spontaneous initiative. Having established a basic level of commitment, she invites those interested to attend a start-up workshop. She presents some possible ways forward to the members, which are discussed by the group and turned into an optional activity list. All participants decide to work on integrating possible activities into their regular consultancy projects, but this is not really made into a group effort.

Learning Phase. A further plenary meeting is held to discuss the literature on learning organizations and grasp the basic tenets of the concept. Participants also discuss their own viewpoints on the topic and the way they might use it in their own practice. Two of them team up to develop a learning organization questionnaire, which is initially used to diagnose their own company. Two others combine forces to reflect on the way in which they have used the concept in a real-life consultancy case. These sub-group activities are next discussed in a plenary session. Individual members are very much in charge of their own learning process and, although they decide to work together in teams for the remainder of the project, in fact the program runs down from this moment on. Most participants report the learning organization concept offers few concrete opportunities for commercial application, even if some of them have succeeded in gaining benefit from their individual activities.

Table 2.
Four cases of action learning programs, in four organizations characterized by different work types.

	Case A: 'Factory'	**Case B: 'College'**	**Case C: 'Hospital'**	**Case D: 'Consultancy'**
Participants, **Work** Type, *Learning Theme*	Process operators, **Task** work, *"Making work processes more transparent"*	Liberal arts teachers, **Individual** work, *"Guiding students who learn independently"*	Medical doctors, **Professional** work, *"Developing a new medical treatment"*	Training consultants, **Group** work, *"Applying the learning organization concept commercially"*
ORIENTATION PHASE				
Mobilizing the Participants	Initiative of management; team leader creates operator team with facilitator	Initiative of school management; external advisor holds survey; teachers participate voluntarily	Initiative of medics; nurse and technicians invited to join preparation group	Spontaneous initiative after presentation of one member; those interested encouraged to participate
Analyzing the Learning Theme	Group adopt management's problem and goal statement	Preparation group of teachers discuss survey outcomes and implications	Study literature; working visit to specialized clinic; bring materials	Key member discusses her ideas about possible activities with others
Putting the Learning Program into Context	Improvement team in attempt to overcome top-down failure; operators actively represent each shift	Management gives group free rein; advisor suggests possible activities via one group member	Hospital management provides financial resources; medics have autonomy to develop new treatments	Project not really embedded in every-day learning and work; individual members relate it to their situation
Making a Learning Contract	Weekly meetings supplemented by small-group work	Remains largely implicit (except for regular meetings with advisor)	Each member's expertise is needed, and called upon, for success	Remains mostly implicit (except for optional activities listed in minutes)
LEARNING PHASE				
Creating the Learning Program				
Learning in Learning Situations	Survey among shifts; working visits; sub-group assignments; expert lectures; experiments; shifts instruction; improvising	Video-based discussion about own practice; exchange open-learning experience; read articles; visit each other's classes; list implications	Experimental treatments on sheep; group evaluation and self-study; optimization; publications and conference; gradual standardization	Discuss literature and participant views on 'learning organization'; two members develop questionnaire; two discuss own practice; group feedback
Learning-Program Coordination	Facilitator directs group through problem-solving method	By group, based on individual interest; advisor makes suggestions	Continuous methodical adaptation by medics to insights gained under way	Limited coordination after start; idea to work in sub-groups
Learning-Program Guidance	Facilitator monitors linear application of problem-solving method	One teacher discusses options with advisor; group members choose activities	No specific guidance except via joint work towards standardized treatment and via professional consultation	None, individual members guide themselves through their own learning program
Optimizing the Learning Program				
Tuning to Learning Views	Method is geared to operator use	Teachers take main decisions about learning activities	Group decide about learning activities to be undertaken	Consultants choose whichever activities suit their needs and views
Tuning to	Method helps operators to	Teachers take main decisions	Continuous adaptation to	Consultants translate new

Work Views	invent and implement concrete improvements	about individual work improvement	developing work views forms core of project	insights gained to their own work practice
Relevance for Work	Method helps operators tackle work problems that they experience	All teachers deem learning theme relevant to their own work practice	Project on cutting edge of medical technology, as initiated by medics	Most members find core concept too remote from commercial application
CONTINUATION PHASE				
Resuming Individual Learning Paths	Operators have learned to use problem-solving method	Teachers have experienced learning in a group of colleagues	Medics return to 'normal learning' after benefiting from group effort	Every-day learning efforts have hardly changed during the project
Improving Organizational Learning System	Learning system enriched by use of improvement-team approach	Organization has witnessed self-directed learning of teachers	Department has integrated multi-disciplinary work into an innovation	Company has found out that this way of teaming up proves ineffective
TYPE OF LEARNING PROGRAM	Vertical, well performed, systematic (optimized regulated program)	Liberal, rather unsystematic (lack of arrangements and process reflection)	External, well performed, systematic (with also some horizontal features)	Horizontal, rather unsystematic (lack of group effort; some liberal features)

Continuation Phase. Since nothing much has changed in the way the consultants learn, they resume their normal learning path with a vague sense that the learning program could have been a lot more successful. The organization as a whole has experienced that this particular approach is rather ineffective and probably not the best way to go forward, although they cannot quite put their finger on where exactly things have gone astray.

Type of Learning Program. This case is an example of a hardly systematic horizontal learning project, which is characterized by a lack of commonality among its members. There appear also some elements of a rather unsystematic liberal learning project, in the lack of mutual engagement that is enforced among the participants.

Table 2 gives an overview of the key elements in these four action learning projects.

Conclusions and Discussion

To answer the first research question, most of the activities that were conducted in organizing these four action learning programs focused heavily on the core learning phase, especially on carrying out the learning program. Fewer activities were undertaken in the orientation and continuation phases, and in the optimization process within the core learning phase. In all four cases, however, employees conducted many of the central learning activities themselves, either supported, facilitated, or directed by a learning coach or a manager.

To answer the second research question, differences were found among the four action learning programs in terms of most activities that the participants conducted. The three main phases (orientation, learning, and continuation) were organized differently across all four cases. There appears to be a relationship between the type of action learning program and the organization of work in this sample. The vertical learning project (case A) and the external learning project {case C), which were performed very systematically, are highly contingent with their contexts of task work and professional work, respectively (cf. Table 1). The liberal learning project (case B) and the horizontal learning project (case D), if conducted less systematically, are also largely contingent with their contexts of individual work and group work, respectively.

It is concluded that employees have their own strategies to organize action learning programs. Moreover, there are several ways in which they organize these learning projects. The work context is found to be an important factor to explain differences among learning programs (Torraco, 1999). It seems that, to a large extent, the same organizing principles governing specific work contexts apply to the creation of work-related learning programs by employees. Systematically taking into account the every-day learning and work improvement efforts of employees can make action-learning programs better suited to their situation before and after a specific program (which is why the orientation and continuation phases are so crucial). These every-day activities should be made more explicit and systematic, throughout the duration of the learning project (which is why optimization should be an ongoing concern). However, too much formalization of a learning program may be counter-productive, for there is a risk of losing the intrinsic benefits of informal learning and work improvement efforts. Therefore, employees should be co-organizers in all phases of learning-program creation. Learning coaches and managers should help them organize the relevant connections between every-day learning and work improvement efforts and their more systematic

learning-project activities. Poell and Van der Krogt (in press) present a number of different models, which can be used to this end.

Future research should focus on action-learning programs that are carried out in different work contexts using the alternative method described in this paper, instead of reinterpreting learning projects conducted without employing this approach. This would provide answers as to why the orientation, optimization, and continuation phases in some learning-project cases were relatively under-addressed. It would also show exactly how important it is for employees, learning coaches, and managers to pay sufficient attention to these activities. An action research approach would be suitable for these questions to be answered. It would offer the various actors an opportunity to study, interpret, and redirect their organizing strategies by relating them to the theoretical framework presented by the researchers. This will enable the practitioners to develop situated theories of practice about organizing action-learning programs. The researchers will be able to build empirically founded models for the various strategies that employees, learning coaches, and managers can employ in different work contexts.

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Comparing Action Learning Programs at Six Universities on Three Continents: Similarities and Differences

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There is a growing inclination to use action learning approaches for leadership development purposes in US businesses and governmental institutions. Enterprises that have been involved with action learning include General Electric (GE), Exxon, Union Carbide, CONOCO, Public Service Electric and Gas (PSE&G) of New Jersey, Motorola, TRW, Arthur Andersen, Marriott, US Army and British Airways. Use of action learning has been slower to take hold in institutions of higher learning. Six universities on three continents in the 1990s have launched significant action learning programs. These universities are also in various ways serving as a collaborative network for action learning initiatives in higher education.

Keywords: Action Learning, Higher Education

Until quite recently, there has been only limited application of action learning approaches in institutions of higher learning. Action learning focuses on learning through the address of real issues and problems. Willis (Unpublished paper, 1999) defines it this way:

> Action learning is a process of reflecting on one's work experience and beliefs in a supportive/confrontational environment of one's peers for the purpose of gaining new insight and resolving real business and community problems in real time.

The problems to be addressed can be extremely complex, even insoluble. Because there is no "book solution" and the problem area being addressed can be unfamiliar, the learner may be operating well beyond his or her personal comfort zone. In such a situation many opportunities for "deep" learning can present themselves. First and foremost is the questioning of underlying assumptions. Because a *real* problem is being addressed, there is often a sense of urgency involved.

What corporations seem to find so attractive about action learning modalities is the multiple benefit values the approach can yield. Participants have an opportunity to practice their leadership skills in a real life situation. There are opportunities to practice team building as well, including group norming and conflict resolution. Basic problem solving skills can be enhanced. There are also more subtle benefits that can accrue, such as an enhanced sense of self-worth and self-confidence. For many reasons, but primarily because of proven value, action learning has found its way into the mainstream of corporate universities. Meister (1998) lists action learning as a key part of the methodology now being adopted as a result of the "paradigm shift from training to learning."(p. 22)

Given the growing interest in action learning in business, why have institutions of higher lear ning been slow to use the approach? One reason seems to be the large psychological shift required. Universities are places where didactic approaches to learning are still very much in vogue. The lecture, prescribed lesson plans and formal ways of learning are deeply embedded norms of behavior. Attention is often on preset learning objectives. Action learning is grounded in principles that fit well with adult learning theories, such as androgogy, with the learners having a substantive voice in how the learning experience will unfold and what will be learned. This can be diametrically opposed to a model that gives the professor a ubiquitous presence and authoritarian hold over the learning.

Problem Statement

What can we learn from examination of the six universities that are the focus of this research, spanning three continents, three US states and the District of Columbia? The universities involved are: Virginia Commonwealth University, George Washington University, University of Salford, in England, Georgia State University, University

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of Texas at Austin and the University of Ballarat, in Australia. When we compare the action learning programs at these universities, what similarities and differences are evident, and what do the comparative profiles suggest in terms of a model that can be adopted widely in university settings?

Theoretical Framework

Probably the most basic theoretical construct related to action learning is that developed by Reginald W. Revans of England. He posits that learning equals Programmed Instruction (P), plus Questioning Insight (Q), (1983, p. 11). He reduces it to the equation L = P + Q. From this basic formulation, Revans outlines a basic philosophy of what it takes to survive in a rapidly changing world environment. He says, for example, that unless the rate of learning exceeds the rate of change in your environment, you will be in trouble. This applies to both individuals and organizations. He goes on to say that Programmed Instruction, which includes lectures, textbooks, case studies, and simulations all have their place, but what becomes of stellar importance as we enter the millennium is the Questioning Inquiry. Revans also believes you must start with the "Q" rather than the "P", because Questioning Inquiry can alert you to the absence of relevant "P" you need or the flawed nature of the "P" that exists.

Revans also stresses both reflection and action (p. 49) and the consideration of four principal "exchange options" for learners. They are a combination of Problem and Setting, and whether they are familiar or unfamiliar (p. 19). While any of the four possible options can produce meaningful learning, he considers the coupling of an unfamiliar problem with an unfamiliar setting the most powerful and potent platform for learning. It also causes the "set" to draw on its limited expertise in questioning assumptions and seeking new and creative solution paths.

Research Questions and Propositions

If there is a belief that action learning can hold out promise for meaningful learning in the university setting, as seems more and more evident in the business context, then how do we go about it? The university setting and culture tends to be quite different from a business environment. The classroom experience, as traditionally modeled, is far removed from the raw dynamics of running a competitive business in a global economy. The classroom can be isolated from what is occurring in the workplace, and the professor, while academically and intellectually keen, may lack experience and empathy for the business environment. The term business environment is used here to include all professional organizations, whether private companies, governmental organizations or non-profits.

Taking some of the common threads associated with action learning, several research questions were developed for the purposes of comparative analysis and profiling of the six programs:

1. How does it fit into the curriculum?
2. What triggered the action learning approach, and when?
3. How has it evolved and how is it structured?
4. Who are the students?
5. How are individuals assigned to the sets?
6. Are the projects jointly held by members of the set, or does each set member have his or her own work related project?
7. Does the project represent familiar or unfamiliar territory to the student?
8. How large are the action learning sets?
9. Do sets have external facilitators? What are they called, and how do they operate?
10. How is project/problem determined? Is it a real project? Does it cause students to "stretch"?
11. How are course grades determined, as applicable?
12. To what extent is the client educated/informed about action learning?
13. What type of orientation is provided to students concerning the action learning process?
14. What basic philosophical grounding influences the program?
15. What principal challenges are encountered in using action learning?
16. What success stories come to mind?

Methodology and Research Design

The researcher originated the action learning program at Virginia Commonwealth University and has been a collaborator with each of the other five institutions of higher learning for the past three to five years. That collaborative bond added greatly to the ability to probe the underpinnings of each program.

The researcher interviewed the principal originator and organizer of each program outside VCU. He also subjected his own program to like scrutiny. The principals involved were:

1. Robert L. Dilworth, School of Education, Virginia Commonwealth University.
2. Michael J. Marquardt, Department of Human and Organizational Studies, School of Education and Human Development, George Washington University.
3. David Botham, Director of the Revans Centre for Action Learning and Research, University of Salford, United Kingdom.
4. Verna J. Willis, Department of Public Administration, Andrew Young School of Policy Studies, Georgia State University.
5. Annie Brooks, School of Education, University of Texas at Austin.
6. Neil McAdam, Business School, University of Ballarat, Australia.

A limitation of the research is that all six program leaders are very close to their individual programs and this can produce some inherent bias. Another limitation of the research is that the six universities can be construed to be the primary universe, with results of the research therefore taken as applicable to all such programs. The six programs concerned can be considered leaders in the field, but there are also other universities around the world actively exploring action learning applications

Word Profiles of the Six Programs

Virginia Commonwealth University (VCU) began exploring action learning in 1993, and by 1995 had revised its Adult Education and Human Resource Development Program in the School of Education to incorporate action learning principles. All courses were brought under a portfolio assessment system that encouraged students to keep personal learning logs and required "reflective essays" at the conclusion of each course on what had been learned. Action learning exposure was threaded through the program, especially in the Human Resource Development related courses. The Comprehensive Examination requirement in the Master's degree program was jettisoned in favor of a capstone course entirely focused on action learning.

The Master's degree students are assigned to a set of four to six stud ents in the capstone course. Six students is considered ideal. These students are assigned a *real* project/problem in urgent need of resolution at a local business. Students are NOT given a choice of project or set. Sets are mixed to promote diversity and blend various learning styles. Half of the course grade is team based and requires a formal presentation to the client and submission of an extensive written report at semester's end. In spring 1999 one set worked on a major problem for White Oak Semiconductor, a multibillion dollar Motorola-Siemens start-up.

Students also submit an extensive individual report on the action learning process, group dynamics and personal lessons learned. Throughout the course, students engage in dialogue that focuses on the learning that is occurring.

The professor serves as a "learning coach" to all sets and jump starts the process as a facilitator. Thereafter, the professor as a "learning coach" attends set meetings only as scheduled or "by invitation only" of the set.

Philosophically, the program indexes to the principles developed over many years of action learning experience by Reg Revans, as well as the writings of Mezirow, Knowles, Lindeman, Lewin, McGregor, Schön, Argyris, Freire and Drucker. The core philosophy is on setting up a good process and then trusting it. That requires standing back and practicing empowerment, allowing learners to learn through the "wash board" road of real life experience. This permits learning to be constructed in ways that are personally relevant to the learner.

George Washington University

Action learning is now threaded through both Master's and Doctoral level programs. In the case of the Executive Leadership Program (ELP) Doctoral program, the practice of action learning is introduced to all students soon after

they enter the program. They also have the option of taking an elective course in action learning that is offered each year. In this case, each student comes to the course with a problem from work. They are assigned to sets of five to six students. During the semester they discuss the challenges and the learning that is occurring as they develop their individual projects. Each set rotates facilitator responsibilities within the set after seeing it demonstrated by a faculty member during initial phases of the course. In effect, students are asked to manage their own set dynamics as part of the learning process. In terms of course grade, a 20-page paper is typically submitted as a part of the doctoral level course on what has been learned, and what the student has learned about him or herself. A final presentation must be given as well.

All students, whether in Master's degree or Doctoral programs, end up gaining an exposure to action learning. Action learning has become a core staple of curriculum design. In the case of the program extension in Singapore, the first two courses use action learning sets, with eight different meetings over a three-week period In terms of philosophical grounding, students are exposed to such theorists as Jack Mezirow, Reg Revans, Kurt Lewin, Malcolm Knowles and Warner Burke.

University of Salford, The Revans Centre for Action Learning and Research.

The Revans Centre for Action Learning and Research was created in 1995. Its first group of action learning students began their study in mid-1996. It now has over 200 students enrolled, 22 at the doctoral level, 32 diploma (certificate) students and the balance, Master's degree students. The entire program is action learning based. Students operate in action learning sets of five or six and deal with individual projects from their workplace. Forty-four percent of the students are currently from the National Health Service, with the balance coming from a variety of backgrounds. Seventeen companies now sponsor the Centre.

While a member of the faculty is assigned to each set, this "facilitator" is only intermittently present at set meetings. A "policy of politeness" is followed, with the facilitator usually only present when the set invites them. Students are not given grades, but there is an interview assessment by a faculty panel at the mid-way point in the program (usually after the first year) when the student presents his or her "achievements" to a panel. An 8,000 word paper is turned in relative to what the student has learned. While the project is material and significant, it is secondary to what the student is learning about their own learning, process of learning and their own development as a human being.

About two years after the interim assessment, the student appears before another panel and is subject to all the rigor related to a thesis requirement (50,000 words for a Master's degree and 100,000 for a Ph.D.).

Georgia State University

The action learning program at Georgia State University (GSU) has been in existence since spring 1996. Action learning has become an integral part of the philosophy governing delivery of the Human Resource Development curriculum. The capstone course in the Master's Degree program is based on action learning. It is expected that it will also once again be a part of the Doctoral program when new applications are accepted. Most students are in the Human Resource Development program.

The capstone course involves students with an assigned project out in the community. Operating in sets of five to six students, each set is assigned a common project. The project is negotiated with a local business client by the professor and will usually be in an area unfamiliar to the student. The project must be real and significant to gain acceptance. In determining who will be in a given set, gender, learning style differences, nationality, whether from a private or public sector business environment, race and prior experience in human resource development are taken into account.

Students meet in class each week to discuss the project and what is being learned. The professor serves as a "shadow facilitator", meaning that students fundamentally manage the set process.

Fifty percent of the course letter grade relates to the project, including a final presentation to the client and any presentation related papers. The other half relates to "auxiliary learning." Students submit four major papers during the semester on literature that bears on issues relevant to action learning. Students also submit reflection papers on what is being learned. To prime students for their action learning involvements in the course they are exposed to the writings of Revans, and other action learning specific literature. They are also taken through exercises on questioning, since "questioning inquiry" is so central to action learning. Philosophically, adult learning theory and the proposition that learners should have active involvement in the learning process, undergird program design. The

philosophy also speaks to an appreciation for diversity, acquiring a deeper sense of humanity, sense of optimism that things (however large) can be changed and an understanding that the student doesn't need to be perfect.

University of Texas at Austin

The action learning program at the University of Texas (UT) at Austin began in 1994. Its locus is in the School of Education, but it is distinguished by the fact that it has evolved into a cross-disciplinary degree as well. The Education School serves as academic partner in terms of quality of the Master's of Human Resource Development Leadership (MHRDL) and the Business School handles the financial aspects and logistics. Action learning is interwoven throughout the program and the core of three course containers that all Master's degree students must take.

The first (a four credit hour course) covers the entire first year in the program and involves an action learning project. The second year students take a Master's thesis related course that links theory to practice (e.g., the theory of power). In the third year, because of the growing importance of global awareness, students complete a course that takes them to Australia in partnership with the University of Ballarat. While in Australia, they visit companies and learn of their principal issues and challenges. They then do a week-long analysis and report back to the businesses on questions that they perhaps need to be asking as they work through their principal issues and challenges.

Students are assigned to action learning sets of six on the basis of ethnicity, gender, background and learning style (Myers-Briggs Temperament Inventory). They are not allowed to pick their sets. Students bring a project from their own workplace. It must be a real project with a concrete anticipated outcome. Each set has a "set adviser", often a doctoral student taking on this responsibility in a paid adjunct professor status. Advisers are rotated among sets, and the set advisers themselves form a set where they can share experiences and discuss their own learning

Basic philosophical grounding of the University of Texas program relates to the writings of Revans, a "post-structuralist" view, equality of power, a belief that expert knowledge no longer holds sway, concern with marginal populations (and the value of the knowledge that can be gained from people at the margin), and multiple bases of knowledge. Grading of students is based on their "descriptive log" of the learning process, project presented to the professor (as if the client), reflection by students on the group process and "meta-reflection" on individual learning.

University of Ballarat

The University of Ballarat is currently (1999) reviewing and adapting its curriculum design related to action learning. Interest in action learning extends back to 1993. It was sparked by an effort to identify approaches that might generate "work based reform". It first incorporated action learning in its Master's degree in Business Management (MBM) program in 1996. As initially conceived and orchestrated, students became involved with "functional preparatory knowledge units" in their first year in the program. The functional preparation was built around action learning and development of a "questioning style". During the introductory phase of the program, a three-day "preparation workshop", the students choose the set they wish to be in. While the sets are formed based on student input, they are asked to use diversity as a prime reference point. At least one "overseas student" is to be in each set.

During the second year, students enter a more advanced stage that is crafted around action learning. Students determine individual projects they will be working on in concert with the professor. Forty percent of their curriculum content (and grade) relates to the project. Another 30 percent relates to their personal development, and the last segment relates to what is called the field of studies concept. They shape and present individual learning contracts as well as an "operational contract" with the client specific to the project. The client is usually the workplace supervisor of the student. The professor or other staff member works with the set initially. Thereafter, the faculty member joins the set "by invitation only". The sets are expected to develop their own norms and do their own facilitation.

Assessment of students is distributed and includes, in the case of the 60 to 90 minute final project presentation to client, evaluations by the client, academic supervisor and fellow set members. Philosophically, the program is heavily influenced by Revans. The most effective way to learn is viewed as allowing "free flight" in association with mature colleagues. It requires "giving up" the usual way of learning. The less effective way of learning, and "the easy way out" is the definitive structure of support associated with traditional educational methods.

Synthesis of Research Results and Findings

There were seventeen areas of comparison identified as a result of the research. They are shown below:

Areas	Yes	Somewhat	No/Very Limited
Focus on learning and critical reflection.	All		
Use of a real world project as a learning vehicle.	All		
Use of action learning sets.	All		
Areas (Continued) Sets of five to six.	GW, GSU, UT, Salford	VCU and Ballarat will accept four, while preferring five to six.	
Students may select set they belong to.	Salford GW Ballarat	VCU	UT, GSU,
Extensive pre-orientation of of students in action learning.	Ballarat GSU GW, UT, Salford	VCU	
Connection to Revans model.	All		
Individual student projects that are workplace based versus joint set project.	Ballarat GW Salford	GSU, VCU	
Final presentation required (project).	All		
Student unfamiliarity with project.	GSU, VCU	Ballarat	GW, Salford, UT
Faciltiation of set by person External to the set is extensive.	UT		Ballarat, GSU, GW, Salford, VCU
Extent to which client is given a comprehensive orientation on action learning.	GW	Salford (Increasingly client is a former student.)	Ballarat GSU UT VCU
More challenging to student than traditional curriculum.	All		

Multiple AL based courses involved.		Ballarat Salford UT	GW (one at Ph.D. level; can be more at Master's degree level).	GSU (one)	VCU (one)
Student evaluation influenced by more than one professor's judgment.		Ballarat Salford		GSU GW	UT VCU
Learning perceived to far exceed traditional classroom approach.	All				
A more challenging and complex way to teach from a professor's perspective.	All				

Analysis:

A review of the comparisons identified above indicates that the principal differences among the programs relate to the opportunity for students to select the action learning set they will be assigned to, whether the project is an individual one or one to be addressed by set members jointly, whether students have prior knowledge/expertise in the project area, the degree to which action learning is found in multiple course containers and the nature of facilitation. In large measure, the degree of commonality across the programs is much greater than the dissimilarities. It is worth noting that five of the six programs limit the amount of external facilitation provided to sets. This has been an area of philosophical disagreement among scholars of action learning. Some believe that the coaching and intervention by facilitators is necessary for the learning process to be fully realized. Others take the view (including Revans) that an important part of the learning comes from self-management of the set and learning processes by its members.

Successes

All those principal organizers/interviewees associated with the six programs covered by this research could point to perceived successes. Each volunteered information that related to benefit values they associate with using the action learning format. They included a heightening of the students feeling of self-worth and self-confidence, personal transformation, enhanced ability to work in teams and take on daunting challenges, and the inclination to think much more deeply about the basis of their assumptions. There is also evidence of enhanced career success. Students also learn how to ask the right questions of themselves and others.

Conclusions and Recommendations

1. Action learning has proven its value at the six universities covered by this research and deserves to be more broadly applied in higher education.
2. Action learning can be counter-intuitive to academics who have used formal instructional methods throughout their careers. Therefore, it is important that they experience it before trying to apply it.
3. Action learning can be counter-cultural to organizations, including academic institutions, because of the egalitarianism of the concept. It can be perceived as a threat to established power structures. Therefore, it requires someone in authority at a high level, who understands the concept and is willing to personally support it, to leverage introduction of action learning.
4. Action learning is a manifestation of adult learning theories in practice, especially androgogy, where the learners are at the center of the learning experience and empowered to shape it in personal ways, as opposed to a predetermined learning design that may prove tangential to learner interests.

How this research contributes new knowledge in HRD

There has been rising interest in use of action learning in corporate settings. It also is making a substantive appearance in the curriculum of corporate universities. It has not made deep inroads in higher education.

There is a need to devote more attention to how action learning can be made to prosper in higher education, as a complement to, not as a replacement for coverage of core academic subjects. The answer may lie in determining how to effectively blend action learning into academic curricula. That is why more research, such as that covered by this paper, is needed.

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